

## **SECTION 3.15 POSITION DESCRIPTION QUESTIONNAIRE (PDQ)**

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A Position Description Questionnaire (PDQ) is the basic document used for position classification and the selection process. It is a written description of the duties, responsibilities, critical competencies, essential functions, organizational relationships, and applicable selectives and special requirements assigned to a position. It is a description which, if properly prepared, will allow identification of the kind and level of work being performed. When the kind and level of work are known, a determination can be made on the proper job class for the position. As the primary source of job information, the PDQ is critical to the position classification system. It also serves as a resource for developing vacancy announcements, screening tools and interview questions.

The Supervisory Analysis Questionnaire (SAQ) is an addendum to the PDQ. It is used for positions supervising two or more employees and provides information on the nature of the supervision being exercised. Supervision is defined as “a responsibility assigned to an employee by management to direct the work of two or more employees and to hire, evaluate, reward, promote, transfer, layoff, recall, respond to grievances, and discipline those employees.” Supervision is different from lead work responsibilities, which are defined as “a responsibility assigned to an employee by management to direct the work (instruct, answer questions, distribute and balance work load, accept, modify or reject completed work, maintain attendance records, report infractions and provide input on staffing decisions) of two or more employees (federal, state, county, municipal, private employment organization, volunteers, inmates or residents).” Lead work duties are included on the PDQ; a SAQ is not submitted for lead work positions.

The Bargaining Exemption Questionnaire (BEQ) is an addendum to the PDQ. It is used for nonsupervisory positions that a department believes meet the collective bargaining exemption criteria of Chapter 20 of the Code of Iowa. The BEQ is to be completed whenever a position is proposed to be excluded from collective bargaining agreement coverage. If a position is currently exempt and a department proposes changes in the position that could result in coverage by collective bargaining, this same form is used to initiate the request.

The Merit Exemption Questionnaire (MEQ) is an addendum used to document a request to exempt a position from the merit system provisions. The MEQ is to be completed whenever a position is proposed to be excluded from the merit system provisions. If the position is current exempt and a department proposes changes in the position that could result in coverage by the merit system provisions, this same form is used to initiate the request.

A PDQ, SAQ, BEQ and/or MEQ, as applicable, must be on file in the personnel office of the department of employment for each nontemporary position. A copy of the PDQ, SAQ, BEQ, and MEQ forms, along with instructions for their completion, are included in this chapter.

### **When to Prepare a PDQ**

A PDQ is to be prepared in the following situations:

- When a new position is established.
- When a job class change is requested for a position.
- When a change is made to a position's duties and responsibilities, even if the change may not warrant a class change.
- When DAS-HRE requests that a PDQ be prepared.
- When an employee wishes to submit a PDQ for review.
- When competencies or essential functions for a position are established or changed.
- When performance evaluation criteria are established.
- When supervisory duties are added or removed from a position.
- When lead work duties are added or removed from a position.

The timing of PDQ submission is particularly important when a change in job duties may result in a reclassification of a filled position. A PDQ must be prepared and submitted to DAS-HRE before a reclassification review will be initiated. A copy of the previous PDQ and current organization chart must accompany the PDQ.

### **Who Prepares the PDQ**

When a position is vacant, the supervisor prepares the PDQ.

When a position is filled, the employee or the supervisor may prepare the PDQ. Generally, the employee should prepare the document, since the employee is most familiar with the duties of the position.

If the supervisor prepares the PDQ for a filled position, the affected employee must be allowed to review and comment on the PDQ. Any substantive disagreement regarding an assignment or description of job duties must be discussed. The supervisor makes the final determination of duties assigned to a position and incorporates those duties into the PDQ. The employee should sign indicating that they have reviewed the document. If the affected employee declines to sign, the PDQ should be signed by the supervisor adding a note to the PDQ indicating that the employee declined to sign the PDQ.

### **How to Prepare a PDQ**

A PDQ must describe the duties and responsibilities assigned to a position in sufficient detail to give the reviewer a basic understanding of:

- The purpose of the position.
- How the position fits into the organizational structure.
- Where the position's work comes from and in what form.
- What the position does with the work and why.
- Where the work goes when the position is finished with it and why.
- The essential functions of the position.
- The critical competencies for the position.

The challenge is to provide neither too little nor too much information. Key factors to keep in mind when preparing a PDQ include the following:

- Describe job duties thoroughly. When a general or ambiguous verb, such as assist, handle, prepare, audit, conduct, supervise, administer, coordinate, manage or review is used, provide additional supporting information that explains the term.
- When describing documents, forms, or procedures specific to a work unit or department, provide information to indicate the basic nature of the work.
- Use your own words to describe the work, not illustrative examples of work performed found on a class description or duties copied from another PDQ.
- The first time an abbreviation, acronym, or form number is used, provide an explanation.
- Separate duties rather than grouping several duties together in large percentages of time.
- When referring to a job title, type of occupation, or profession, provide specific information about the actual work performed.
- Ensure that all information provided is accurate and complete.

## **Essential Functions**

The Americans with Disabilities Act (ADA) prohibits discrimination on the basis of disability. Essential functions are defined as “those functions that an individual must be able to perform in order to hold the position.” Essential functions focus on what must be done not on how it is accomplished.

It is necessary for the supervisor to determine the essential functions of a position and to document them on the Position Description Questionnaire (PDQ).

The following examples have been developed to assist you in making these determinations.

### **1. The position exists to perform the function.**

Example: A position exists to type correspondence. The ability to type is therefore an essential function of the position.

Example: A position exists to proofread documents. The ability to proofread documents is an essential function of the job.

Example: A position exists to substitute for other employees on any shift. Therefore, the ability to work at any time of the day is an essential function of the job.

### **2. A function is highly specialized and the person is hired for special expertise or activity.**

Example: An agency wishes to expand services to deaf persons. An essential function of the job is the ability to communicate using American Sign Language.

### **3. If the function were removed, it would fundamentally alter the nature of the position.**

Example: If the child abuse investigation function is removed from a Child Abuse Investigator position, the position will no longer be classified correctly because an essential function of the job has been removed.

### **4. The amount of time spent performing the function.**

Example: If the employee spends most of the time operating one machine, this is evidence that operating the machine is an essential function.

### **5. Determine the consequences of not requiring a person in the job to perform a function. Although a function is performed infrequently, it is still considered essential if there are serious consequences if it is not performed.**

Example: An Airport Firefighter rarely has to carry a person from a burning airplane, but being able to perform this function is essential to the job.

Example: A pilot spends only a few minutes of a flight landing the plane, but landing is an essential function because of the serious consequences if the pilot cannot perform the function.

Remember that an essential function does not include all the duties of a position. All positions perform duties that are marginally related to the position's primary purpose. The ADA is not concerned with marginal functions.

An applicant or employee with a disability may require one or more reasonable accommodations to perform the essential functions. Properly designed essential functions documented on the PDQ enable an interview team to ask job applicants: “Can you perform the essential functions of this position with or without an accommodation?”

## **Critical Competencies**

Competencies are observable and measurable knowledge, abilities, skills, and behaviors that must be applied to achieve results aligned with the goals of the organization.

- The focus should be on competencies that reflect superior performance.
- Competencies are identified by reviewing the essential functions and the duties performed and identifying knowledge, skills, abilities, or behaviors/characteristics required to perform them.
- Though expressed in general terms, competencies can be applied in different ways depending on the job class and the duties assigned the position. There are also levels to competencies. Problem solving may mean one thing to an accounting clerk and something very different to a transportation engineer. Though competencies are generally expressed in fairly general terms, they can be further defined for the specific position by adding behavioral indicators and/or proficiency levels.
- A competency library can be found on the DAS-HRE webpage for workforce planning at: [https://das.iowa.gov/sites/default/files/hr/documents/class\\_and\\_pay/job\\_competencies.pdf](https://das.iowa.gov/sites/default/files/hr/documents/class_and_pay/job_competencies.pdf)

Competencies are expressed in the following categories:

**Knowledge:** *An organized body of information that must be known to be able to perform the job duties and essential functions to produce the expected outputs/results.*

**Examples:**

- Knowledge of the principles of financial management.
- Knowledge of information technology systems.

**Ability:** *The power to perform an activity at the present time.*

**Examples:**

- The ability to add, subtract, multiply, and divide.
- The ability to read and understand complex written material.

**Skill:** *The proficient manual, verbal or mental manipulation of people, data, or things. This involves consistently demonstrating a pattern of behavior.*

**Examples:**

- Typing skill at the rate of 40 wpm.
- Carpentry skill required to produce furniture and cabinets.

**Behavior/Characteristic:** *An attitude, aptitude, trait or personality factor, physical or other behavioral trait.*

**Examples:**

- **Productive work attitudes:** Displays a high level of initiative, effort and commitment towards completing work efficiently; demonstrates responsible behavior.
- **Ethics:** Applying personal ethics, honesty, and responsibility on the job.
- **Flexibility:** Open to change and new information; adapts behavior or work methods to new information, changing conditions, or unexpected obstacles; deals effectively with ambiguity.
- **Leadership:** Influences, motivates, and challenges others; adapts leadership style to a variety of situations.
- **Stamina:** Performs repetitive tasks effectively over a long period of time.
- **Attention to detail:** Is thorough when performing work and conscientious about attending to detail.

**Behavioral Indicator:** *A task or action step describing how a competency is applied or demonstrated in the job.*

**Example: Problem Solving**

- Identifies and analyzes problems.
- Uses sound reasoning to arrive at conclusions.
- Finds alternative solutions to complex problems.
- Distinguishes between relevant and irrelevant information to make logical judgments.

**Proficiency Level:** *The degree of complexity, difficulty, scope, or independence required to apply a competency or behavioral indicator as needed in the job.*

**Example: Problem Solving**

- **Advanced:** Uses logic to identify and solve critical and sensitive problems involving a major organization. Considers a large number of choices, competing viewpoints and alternatives. Solutions have a national, statewide, government wide, agency wide impact.
- **Intermediate:** Uses logic to identify and solve complex problems for a unit within an agency. Considers various choices, competing viewpoints and alternatives. Solutions affect a wide range of agency activities, work of other agencies or the public.
- **Basic:** Uses logic to identify and solve problems for a work unit. Considers well-defined choices, where there are a limited number of possible actions and the impact is limited to the immediate work unit.

A master PDQ may be developed for those situations where common duties, responsibilities, identical essential functions, and critical competencies are assigned to a number of positions within a job class, including positions that may rotate through a variety of assignments. Care must be taken, however, to insure that master PDQs do not cover positions that have some subtle differences that set them apart from the rest of the positions in the job class. Those subtle differences could be sufficient to have an impact on the classification of a position. If the essential functions or competencies are not the same, a separate PDQs should be completed for each position.